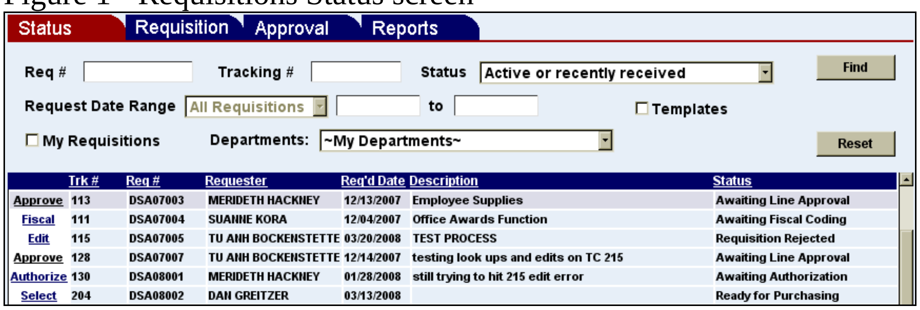
PURCHASING USER MANUAL

THE REQUISITIONS STATUS SCREEN

INTRODUCTION

The **Status** screen displays a list of requisitions that have been saved in the application and allows you to find requisitions by several criteria. A requester can check on the status of their requisition by viewing the **Status** column or by opening the specific requisition to view the status and/or **Receipt info** of each line item. NOTE: A requisition could have several line items each with a different status, so an individual line item status may not be reflected in the overall requisition status.

Figure 1 - Requisitions Status screen

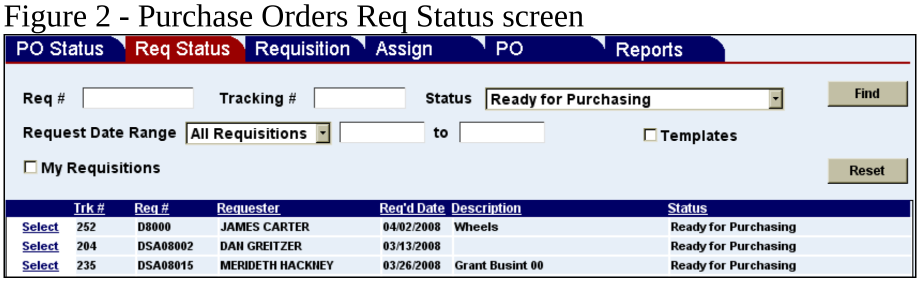


	Trk #	Req #	Requester	Req'd Date	Description	Status
Approve	113	DSA07003	MERIDETH HACKNEY	12/13/2007	Employee Supplies	Awaiting Line Approval
Fiscal	111	DSA07004	SUANNE KORA	12/04/2007	Office Awards Function	Awaiting Fiscal Coding
Edit	115	DSA07005	TU ANH BOCKENSTETTE	03/20/2008	TEST PROCESS	Requisition Rejected
Approve	128	DSA07007	TU ANH BOCKENSTETTE	12/14/2007	testing look ups and edits on TC 215	Awaiting Line Approval
Authorize	130	DSA08001	MERIDETH HACKNEY	01/28/2008	still trying to hit 215 edit error	Awaiting Authorization
Select	204	DSA08002	DAN GREITZER	03/13/2008		Ready for Purchasing

By default, the application displays requisitions that are **Active or Recently Received** and, if your agency has created Requisition Departments, are in the departments that you belong to (**My Departments**).

Purchaser can also view the same requisition status through the **Req Status** screen. The features and functionality is the same as it is for the Requisitions **Status** screen.

Figure 2 - Purchase Orders Req Status screen



	Trk #	Req #	Requester	Req'd Date	Description	Status
Select	252	D8000	JAMES CARTER	04/02/2008	Wheels	Ready for Purchasing
Select	204	DSA08002	DAN GREITZER	03/13/2008		Ready for Purchasing
Select	235	DSA08015	MERIDETH HACKNEY	03/26/2008	Grant Busint 00	Ready for Purchasing

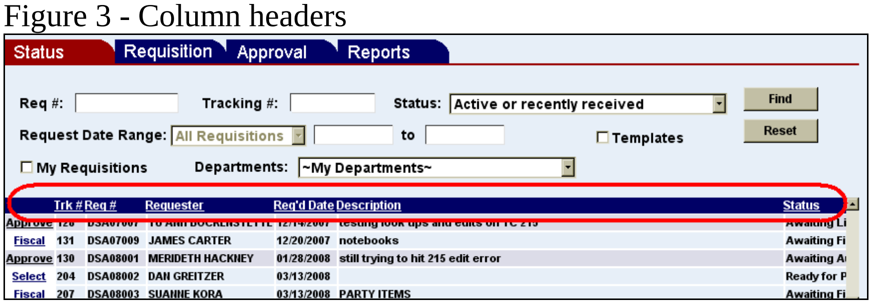
LIST OF REQUISITIONS

The bottom section of the screen displays a list of requisitions. The list is organized by column headers to show the following information:

- **Trk #**. The number of a requisition that is in process but has not been completed. To identify requisitions that do not have requisition numbers.
- **Req #**. The requisition number (if the requisition has been completed).
- **Requester**. The name of the person who created and saved the requisition.
- **Req'D Date**. The date the requisition was created and saved.
- **Description**. The description of the requisition (if one was entered).
- **Status**. The status of the requisition, such as Awaiting Line Approval, Awaiting Fiscal Coding, Ready for Purchasing, Line Item Rejected, Awaiting Authorization, Itemize in Progress, All Items Received, Some Items Received, All items received or cancelled, or New Requisition. NOTE: A requisition could have several line items each with a different status, so an individual line item status may not be reflected in the overall requisition status.

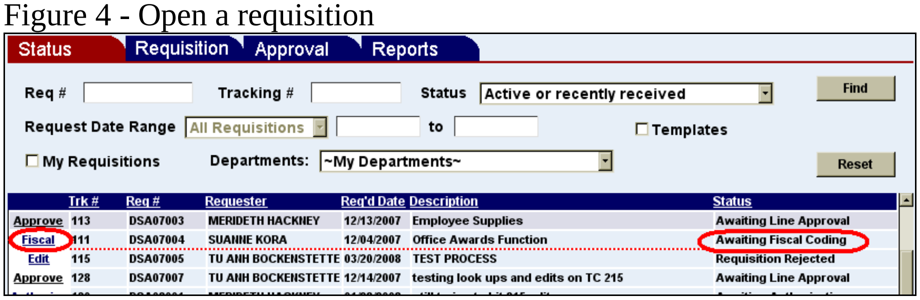
1. To sort the requisition list, click a column header to sort by. For example, click Requester to sort by the requesters' names in alphabetical order.

Figure 3 - Column headers



2. To open a requisition, click the **Select**, **Edit**, **Authorize**, **Fiscal**, or **Approve**, link next to it to complete the process as indicated in the **Status** column.

Figure 4 - Open a requisition



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TO SEARCH FOR A REQUISITION

1. The first section of the Status screen contains search criteria to find requisitions. Select from the following:

   - **Req #**. The requisition number (if the requisition itemization has been completed).
   - **Tracking #**. The tracking number of a requisition that is in process (saved).
   - **Status**. The status of the requisition.
   - **Requisition Date Range**. The date range the requisition was created and saved.
   - **Departments**. Available only if your administrator has created Requisition Departments. Also, this menu will not be seen if a user is *only* a requester. A department is a group of users organized however an agency needs – e.g., by function or location, etc. A requisition or purchase order assigned to a Department can then be processed by the users in that department.
   - **My Requisitions**. Check this to find only those requisitions created and saved by you. (Not all users will have this option. It will not be seen if a user is *only* a requester.)
2. Click **Find**.
3. If desired, click **Reset** to reset the criteria to defaults and then click **Find**.

If you are having difficulty finding a requisition, try the following:

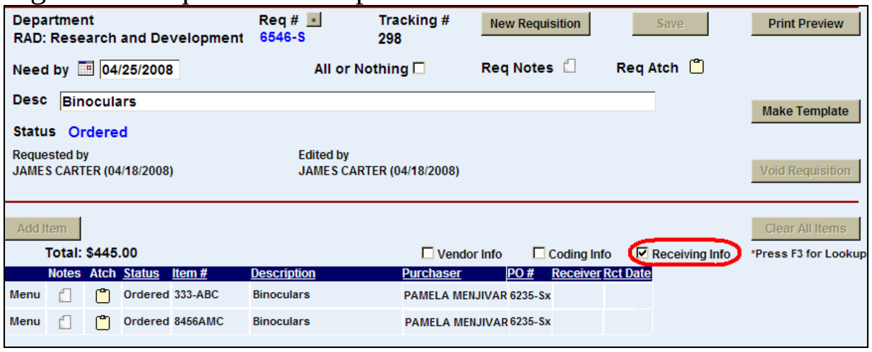
1. Uncheck **My Requisitions** (if applicable).
2. Change the **Departments** (if applicable) – try **All Departments**.
3. Change the Status – try **All Requisitions**.
4. Click **Find**.

TO FIND A PURCHASE ORDER NUMBER OF A REQUISITION

Once a requisition has been saved to a purchase order (either ordered or in the process of being ordered), the status may be '**Ready for Purchasing**' or the line item status may be '**Assigned to PO**'. You can check the purchase order number, the status of the items, the name of the purchaser, and if any of the items have been received.

1. From the **Requisitions** menu, click the **Status** tab.
2. Click **Select** next to a requisition with a status of **Ordered**.
3. Check the **Receiving info** check box.

Figure 5 - Requisition receipt info



The requisition items, the purchase order number, the name of the purchaser, etc. will be displayed